GUIDE TO USING THE RESPONSIBLE FATHERHOOD MANAGEMENT INFORMATION SYSTEM

This portion of the manual is intended to provide an overview of how to get started on the Responsible Fatherhood Management Information System (RFMIS). It provides basic instructions on how to:

- Install the RFMIS
- Start up the RFMIS
- Exit from the RFMIS
- Add new records to the system
- Locate existing records in the system
- Edit existing records
- Delete existing records
- Regularly back-up the data system

The RFMIS has been developed using Microsoft Access 97. It is intended for use on an IBM-compatible PC. Users of this system will typically load Microsoft Access 97 and conduct all operations on the system (e.g., adding new records, editing existing records, deleting records, printing reports) from within Microsoft Access. Once participant records are entered into the system, data may be transferred to other applications (such as SPSS and Excel) for analysis purposes.

The instructions in this portion of the guidebook are intended to provide an introduction to using the RFMIS and its most important functions. These instructions are not meant to be exhaustive. For more detailed instruction on how to conduct specific functions within the Access environment, it is recommended that project staff consult a basic manual on Access 97. If project staff have questions or encounter problems with any aspect of installing or operating the RFMIS, they should contact John Trutko, at (703) 522-0885 or Burt Barnow, at (410) 516-5388.

A. How to Install the RFMIS

The installation of the automated system should take no more than about 10 minutes. Installation procedure will create a directory (i.e., also referred to as a folder in Microsoft Windows) on your computer and then copy one file (i.e., an Access data file) onto the specified directory. Installation and operation of the system will require the following:

- an IBM-compatible system (preferably a Pentium-class PC), with at least 10 mg of available space; and
- Microsoft Access 97 installed on the system.

Step-by-step instructions on installation are provided separately from this manual (along with the installation diskette). If sites need additional help with installation or run into difficulty with installation, they should contact John Trutko, at (703) 522-0885.

B. How to Start Up the RFMIS

- Step 1:Start up your computer.
- Step 2:Start up Microsoft Access 97 [Note: This can be done from the Microsoft Window's Desktop (i.e., at the Main Menu) that appears once your system is fully booted. Using the mouse, click once on the "Start" key in the lower left-hand corner of the Desktop. Use the mouse to move up the menu and highlight "Programs." A list of software programs will appear. Using the mouse, highlight "Microsoft Access" and click the mouse once. This will take you into Microsoft Access.]
- **Step 3:**Once you are within Microsoft Access, a screen will appear which will allow you to create a new data base or open an existing data base (see Exhibit 1). Using your mouse click on "Open an Existing Data Base" (if this is not already selected), then click on the OK box.
- Step 4: This will bring you to a screen with "Open" in the upper right hand corner (see Exhibit 2). [Note: If you have used the RFMIS before, it is possible that it will appear in the list of files and you can simply highlight the file using the mouse and click the mouse to select the file]. On this screen you will select the appropriate directory and file. For example, if the RFMIS was in a directory called "RFFOLDER" on your C> drive, you would follow these steps:
 - Use the mouse to click on the grey downward pointing arrow near where it says "Look in."
 - Use the mouse to highlight and click on ("C").
 - Use the mouse to highlight and double click on "RFFOLDER."
 - Use the mouse to highlight and double click on "RFMIS" (as shown in Exhibit 3).
 - The RFMIS Main Menu will appear on your computer screen (as shown in Exhibit 4).

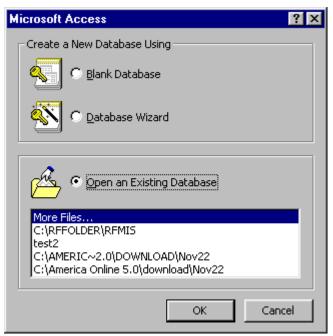


Exhibit 1: Opening Access Database Screen #1

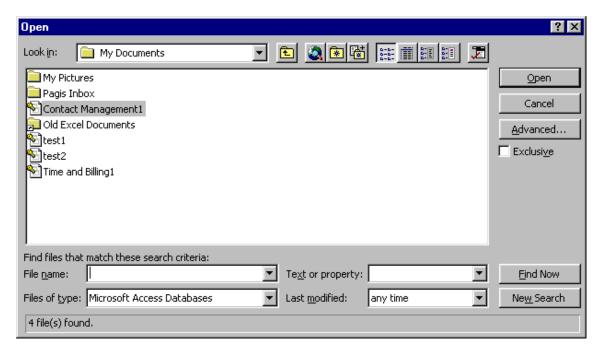
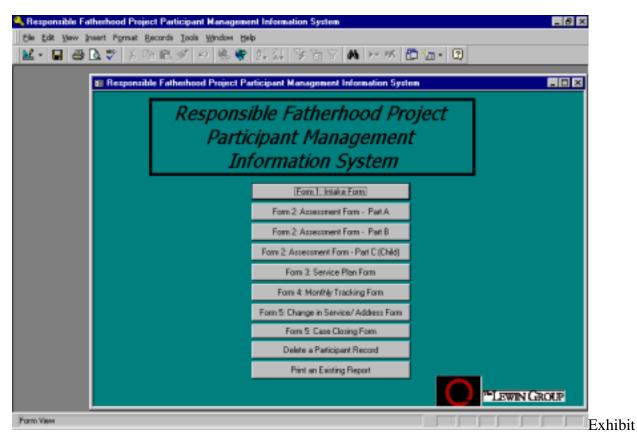


Exhibit 2: Opening Access Database Screen #2

Open			? ×
Look <u>i</u> n:	Particular	Œ	
RFMIS			<u>O</u> pen
			Cancel
			<u>A</u> dvanced
			Exclusi <u>v</u> e
Find files th	at match these search criteria:		
File <u>n</u> ame:	▼ Te <u>xt</u> or property:	_	<u>Fi</u> nd Now
Files of type	Microsoft Access Databases Last modified: any time	▼	Ne <u>w</u> Search
1 file(s) for	und.		

Exhibit 3: Opening Access Database Screen #3



4: RFMIS Main Menu

C. How to Exit from the RFMIS

If you are at the RFMIS Main Menu (see Exhibit 4), there are two main ways to exit from the system.

- You can take the mouse and click on the box with the "X" located in the very upper right hand corner of the screen and this will automatically exit you from Microsoft Access. [When you do this Microsoft will automatically save the entries that you have made in the RFMIS.]
- You can take the mouse and click on the word "File" on the menu at the top of the RFMIS Main Menu, slide the mouse down and click on "Exit." This will automatically exit you from Microsoft Access.

If you are within a RFMIS data form, you can either (1) move to the final screen on the particular form you are working on, and using the mouse, click on "Save Record" or (2) using the mouse click on the box in the right hand corner of the form window. Either method will result in saving of the record to the file and will return you to the RFMIS Main Menu.

D. Adding New Records

The basic procedures for adding new records are the same for each of the forms that are included in the RFMIS (i.e., the Intake Form, Assessment Form, Participant Service Needs Form, Monthly Tracking Form, and Change in Service Needs Form; see Section 1 for a copy of the forms). There is, however, one key distinction that exists between Form 1 and the other four forms in the RFMIS:

- When you first enter a Form 1 (the Intake Form) for a new participant, the RFMIS will automatically enter a Participant ID Number onto the screen. The Participant ID field is what is termed in Microsoft Access an "AutoNumber" field, which means that the system automatically assigns a unique number to each participant entered into the data base. The Participant ID numbers start at 1 and sequentially increases by one (i.e., 2, 3, 4 and so on) as each new participant is added to the RFMIS. It is this Participant ID that is used to link information entered on to the initial Intake Form to subsequent forms entered into the RFMIS for each participant.
- When you enter data on Form 2 (Assessment Form), Form 3 (Participant Service Needs Form), Form 4 (Monthly Tracking Form), or Form 5 (Change in Service Needs, Change of Address, and Case Closing Form) it will be necessary to (a) indicate that you are entering a new form into the system, and (2) find and select from an alphabetized listing of the participants already in the RFMIS the specific participant whose form you are entering.

While the process of entering data into the system is not complicated, it will be important to follow the steps outlined in this guidebook. It also may be useful to practice entering forms on a few participants into the system (perhaps using dummy data) before entering "real" participant data. If desired, the system can be installed first into a test directory (e.g., a folder called RFTEST) and sample data entered; then the RFMIS can be copied into a folder (e.g., RFFOLDER) and used to enter data on actual participants.

Below, we first illustrate the basic procedures for entering a Form 1, and then, we highlight the key difference in entering subsequent forms.

1. Adding a Form 1 (Intake Form) for a New Participant to the RFMIS

A new, completed Form 1 (Intake Form) should be entered using the following procedures (note: all questions on the form should be complete, with the exception of the Participant ID which is generated automatically by the RFMIS):

Step 1:At the RFMIS Main Menu, use the mouse to click on "Form 1: Intake Form." You will automatically be brought into the first (existing) participant record in the Form 1 data base (see Exhibit 5, for an example). [Note: If it is the first record that you are entering into the system you will come into a blank record]. Notice that near the

bottom of screen will be a line that starts with the word "Record" followed by two arrows, a record number, several more arrows, an indication of the total number of records in the data system (note: for this particular form). These arrows are to help navigate through the various records in the system:

- |< If clicked, this box will move you to the first record in the data base;</p>
- < If clicked, this box will move you to the previous record in the data base, from the record you are currently working on;
- > If clicked, this box will move you to the next record in the data base, from the record you are currently working on;
- > If clicked, this box will move you to the last existing record in the data base:
- >* If clicked, this box will bring up a new (blank) record that can be used to enter a new participant.

The two numbers at the bottom of the screen are important -- the first one (in the white rectangular box) indicates the current record that you are on; the second number (which is preceded by "of") indicates the total number of records in the data base (note: for this particular form).

- **Step 2:** *This step is very important* when entering a new record into the system [note: if this is the very first record being entered into the system form, it will not be necessary to hit the >* box because you will automatically be brought into a blank record]. Using the mouse, you will click onto the >* box at the bottom of the screen. This will bring up a new (blank) form onto which data can be entered (see Exhibit 6 for an example). You will also notice that the number of total number of records in the system increases by one and that a new record number will come up in the rectangular box at the bottom of the page.
- Step 3: The cursor will automatically move to the first data item on the form -- A1. Name: Last. At this point, you can begin to enter data. For example, in the attached example, we would type *Smith* in the available space. From here you can move to the next field on the form (i.e., "First") by either (a) using the mouse and clicking on the field, or (b) hitting the "Tab" key on your keyboard (which will advance the cursor to the next data field). Once on the available space next to "First," you simply type in the participant's first name (in our example, *John*). You will notice that as you complete the participant's name, it will also appear in the top right hand corner along with the record number. The Participant ID number and name will appear on every screen that you are working on within the RFMIS so that you can keep track of who you are entering data on. You would then simply move on from field to field using either the mouse to click on the next field or by hitting the Tab key.

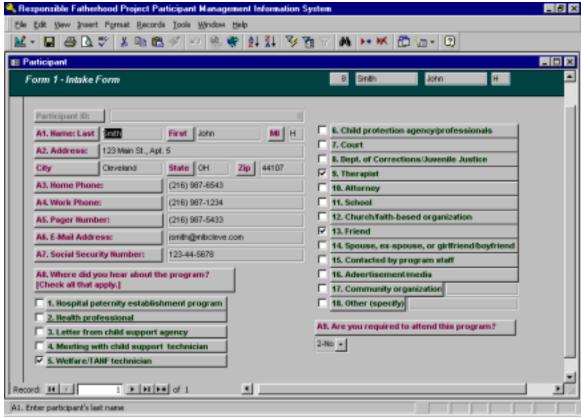


Exhibit 5: Sample Completed Form 1 Record

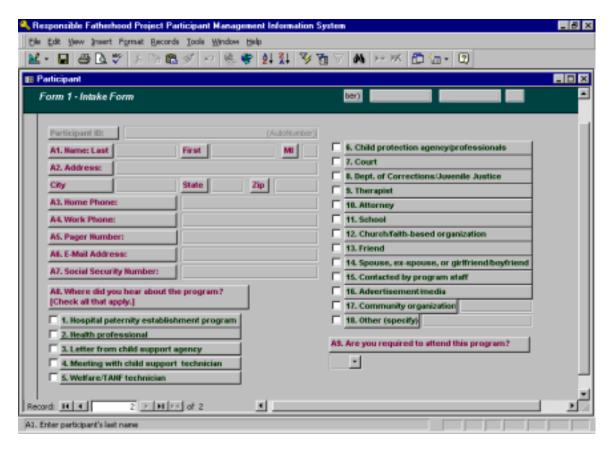


Exhibit 6: Sample Blank Form 1 Record (for Entry of a New Record)

Step 4:Form 1 is broken down into three screens -- 1-Identifiers, 2-Characteristics 1, and 3-Characteristics 2 -- each of which is noted by a folder tab at the top of the screen. You can move between the folders either by (a) using your mouse to click on the tab folder for the particular screen you want to move to, or (b) by hitting the Tab key on your keyboard when you are on the final field on a screen (e.g., on the "1-Identifiers" screen, after you enter data into field A9. [Are you required to attend this program?] and hit the Tab key on your keyboard, you will automatically move to the next field [A10. Date of Birth] on the "2-Characteristics 1" screen.

Step 5: When you complete the final field on the last screen of a form -- on Form 1, it will be field A24. Comments, on the "3-Characteristics 2" screen -- you will see a "Save Record" box. Using the mouse, click on the "Save Record" box -- this will return you to the RFMIS Main Menu. [Note: Microsoft Access enters data to the data file as soon as you begin entering data onto a record. Hence, if you were to hit either of the boxes (with the x) in the far right hand corner of the screen, you would exit the form and also save the record to the data base.]

You will find several types of data fields on the screens. The main types of data fields that are included are the following: (a) text fields, in which you will enter text using your keyboard, such as a participant's name and address; (b) check boxes, in which you will simply click on the box (or alternatively you can use your Tab key and hit a SPACE bar on your keyboard) to leave a check mark in the box; (c) date fields, which will only allow you to enter valid dates (in the month/day/year format); and (d) "list" (or drop-down) boxes, which when clicked on with your mouse will show you all of the choices available on a particular field. The list boxes work as follows: if you click on the grey down arrow next to a particular field (e.g., the field "A11. Gender" on Form 1), you will be provided with valid choices for the field (e.g., A11. offers two choices, "1-Male" or "2-Female") -- simply click with your mouse on the correct entry for the participant and it will be the value entered into the data base.

Where possible, internal edits have been built into the system to reduce the possibility of incorrect data being entered. Limits have been placed on the greatest number that can be entered into some fields. For example, 12 is the highest number permitted on Form 2, B6. "During the past 12 months, about how many months did you work full-time." If you were to enter a value 13 or higher, the system will beep and warn you that the number is in error. You can simply go back into the field and enter the appropriate number.

If you enter an incorrect value into a particular field, you can go back at any time while entering a particular form or at a later date (after the record has been saved) and correct the entry on the field. To correct an incorrect entry in a field, bring up the particular form, find the participant (see the instructions in the next section on how to locate specific individuals), and simply go to the field with the errant entry, enter the correct value, and save the record as discussed earlier.

If data are missing for a particular field, you can enter the rest of the data on the form and come back later when the data becomes available and enter the missing data.

Finally, note that as you land on each data entry field, there are brief instructions at the bottom of the screen. For example, if you cursor onto "A10. Date of Birth," the following data entry instruction will appear on the bottom of the screen, "Enter the participant's month, day, year of birth (e.g., 09/23/75)."

2. Entering Forms 2, 3, 4, and 5

The basic procedures for entering the other four forms (Forms 2-5) are basically the same as Form 1, with one important exception: When you enter data on Forms 2 through 5, it will be necessary to find and select from an alphabetized list of the participants already in the RFMIS, the specific participant whose form you are entering. These forms can only be entered if a Form 1 (Intake Form) has already been entered into the system. Without a Form 1, there will not be a Participant ID number to link all subsequent forms for a particular participant. Using Form 2 (Assessment Form) to illustrate, follow these procedures to enter a new Form 2 through 5.

- **Step 1:**At the RFMIS Main Menu, use the mouse to click on "Form 2: Assessment Form (Part A)." You will automatically be brought into the first (existing) Form 2 participant record in the data base (see Exhibit 7 for an example).
- **Step 2:**Using the mouse, you will click onto the >* box at the bottom of the screen [note: if this is the very first record being entered into the system form, it will not be necessary to hit the >* box because you will automatically be brought into a blank record]. This will bring up a new (blank) form onto which data can be entered (see Exhibit 8 for an example). You will also notice that the number of Form 2 records in the system increases by one and that a new record number will come up in the rectangular box at the bottom of the page.
- Step 3: The cursor will automatically move to the first data item on Form 2, 3, 4, or 5. Using your mouse, you will need to click on the grey "Participant Name/ID" list box, which will provide an alphabetized listing of all participants in the RFMIS (for whom Form 1s have been completed). You can run down the listing of participants using your mouse and click on the specific participant in the listing that corresponds to the participant on the Form 2, 3, 4, or 5. Once you click on the participant's name on the listing, you will notice that the participant's ID number and name will appear in the upper right hand corner of the screen. You are then ready to enter data using basically the same procedures as you used on Form 1. [Note: If someone does not appear on the participant listing, it means that a Form 1 was not originally entered into the system or has been deleted from the system. A Form 2, 3, 4, or 5 cannot be entered into the system unless a corresponding Form 1 has previously been entered into the

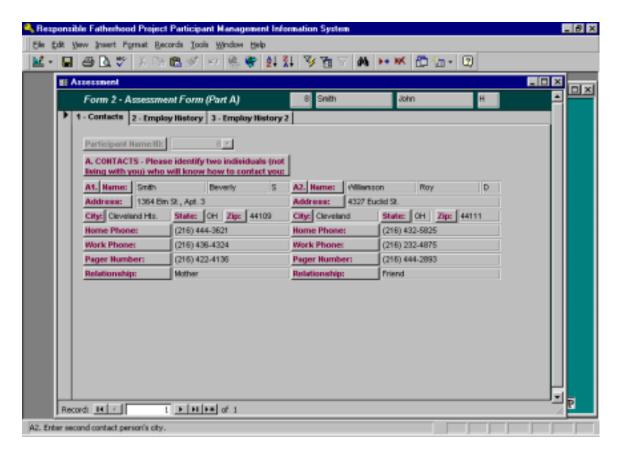


Exhibit 7: Sample Completed Form 2 Record

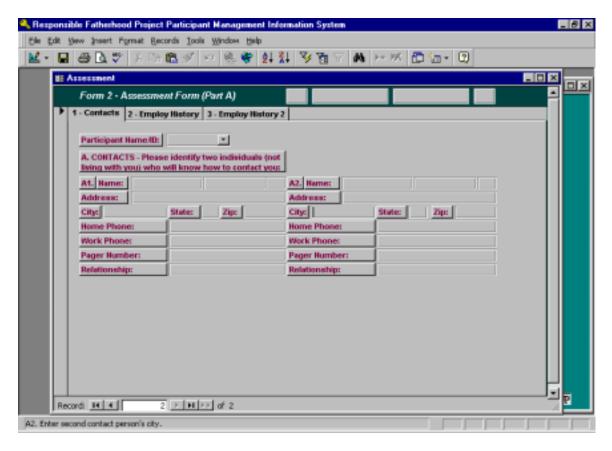


Exhibit 8: Sample Blank Form 2 Record (for Entry of a New Record)

RFMIS. The data entry person should check with project staff responsible for case managing the participant to obtain a copy of a Form 1 for the particular participant.]

When entering Forms 2, 3, 4, or 5, there are several other important items to note:

- Because of its length, Form 2 (Assessment Form) is spread across three automated forms on the RFMIS. Within each of these forms, there are several screens that will need to be completed.
- When a participant has more than one child, it will be necessary to enter multiple Child Forms into the RFMIS for each participant. The RFMIS will permit multiple Child Form records to be linked to a Participant ID Number.
- It is anticipated that most participants will have multiple Form 4s (the Monthly Tracking Form). This form will be completed at the end of each month on each participant whose case has not been terminated. The RFMIS will permit multiple Monthly Tracking Form records to be linked to a participant number.
- Data entry staff may want to consult a Microsoft Access 97 manual for additional instructions on data entry.

E. Locating and Editing Existing Records

If you need to update information within the RFMIS there are a number of ways in which a record can be located. If there are a relatively small number of participants in the data base, you can use the arrow keys at the bottom of the data entry forms to move from record to record (see Exhibit 9). The participant name and Participant ID will appear at the upper right hand corner of the form as you move through the data base.

- |< If clicked, this box will move you to the first record in the data base;</p>
- < If clicked, this box will move you to the previous record in the data base, from the record you are currently working on;
- > If clicked, this box will move you to the next record in the data base, from the record you are currently working on;
- > If clicked, this box will move you to the last existing record in the data base;

A second method for locating records is to use the Find feature in Microsoft Access. Follow these steps:

- **Step 1:**At the RFMIS Main Menu, use the mouse to click on a particular form (e.g., "Form 1: Intake Form"). You will automatically be brought into the first (existing) participant record on that form.
- **Step 2:**Place the cursor on any field that you want to search to find a particular record. For example, on Form 1, you might want to place the cursor on the data entry box for "A1. Name Last" if you were interested in searching the data base for a specific individual (e.g., "Anderson").
- Step 3:Using your mouse, click on "Edit" on the upper left-hand corner of the Microsoft Access tool bar. Run down the menu that appears and click on "Find." A box will appear which will ask "Find What?" Into the space provided, enter the specific value that you are interested in finding (e.g., you would enter "Anderson" if you were interested in finding a participant named Anderson). Once you have entered the value that you want to search on, you can then click on the "Find First" box and the first record meeting the criteria will be shown. When you then click on the "Close" box, you will be on that particular matching record.

A third method for locating records is to use the Datasheet View. To use the Datasheet View you must be in a specific form (e.g., Form 1). Below, we illustrate using the Datasheet View to find a record in Form 1:

Step 1:At the RFMIS Main Menu, use the mouse to click on "Form 1: Intake Form." You will automatically be brought into the first (existing) participant record in the Form 1 data base.

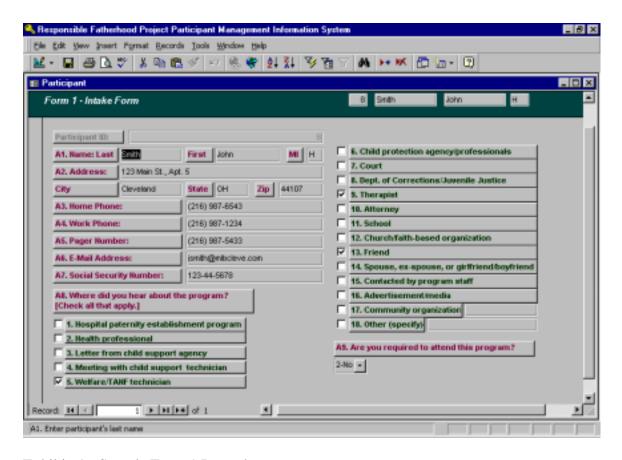


Exhibit 9: Sample Form 1 Record

- **Step 2:**Using your mouse, click on "View" on the upper left-hand corner of the Microsoft Access tool bar.
- **Step 3:**Using the mouse, run down the menu that appears and click on "Datasheet View." A list of participants will appear in a spreadsheet format (see Exhibit 10). At this point there are several options available:
 - If you see the record you are looking for in the listing, you can simply click on the record with your mouse.
 - You can sort the data that appears in the spreadsheet on any field in ascending or descending order. To do this, using your mouse click on the particular field name at the top of a column that you want to sort. This will highlight (i.e., darken) the entire column. Then, using your mouse, click on "AZ downward arrow" on the Access tool bar. For example, on Form 1 you could sort the participant data base in alphabetical order by clicking and holding down the mouse on "A1. Name" and sweeping across the column headed "First" and "MI" and then releasing the mouse. This will highlight (i.e., darken) the three columns under these field names. Then, click with your mouse on "AZ downward arrow" on the Access tool bar. [Note: To return the data base to numeric order by Participant ID, click on "A1. Name" and sweep across "Participant ID," then click on the "AZ downward arrow" on the Access tool bar.]
 - You can move across the Datasheet View spreadsheet with your mouse, the Tab key (to move horizontally), or by using the four arrow keys on your key board.
- **Step 4:**To return to the Form View from the Datasheet View, use your mouse to click on "View" on the upper left-hand corner of the Microsoft Access tool bar. Using the mouse, run down the menu that appears and click on "Form View." You will return to the Form you were working on (e.g., Form 1).

There are several other more advanced ways to search for records -- for example, using queries and reports. Consult your Microsoft Access 97 manual for details on how to do this.

Once you have located a particular record in the data base, to edit existing data in a record, you can simply overwrite that data with new data (e.g., if the last name of the participant was misspelled, you can go into the particular field and correct the misspelling). Access will automatically update the record as soon as you leave the field.

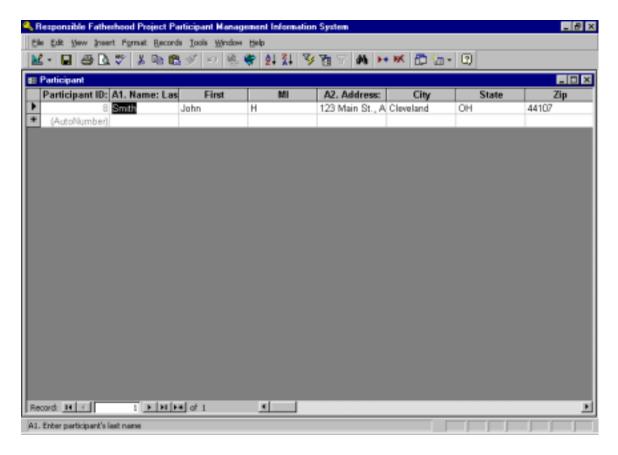


Exhibit 10: Microsoft Access Datasheet View

F. Deleting Records from the RFMIS

Great care should be taken in deleting records from the RFMIS. In the rare circumstances that a record needs to be deleted from the system, follow these steps:

- **Step 1:**From the RFMIS Main Menu, click with your mouse on the box that says "Delete a Participant Record."
- **Step 2:**A screen will appear that says "Please select the participant record that you would like to delete" (See Exhibit 11). Click on the grey downward arrow in the box, which will provide a listing of all participants in the data system. Use your mouse to slide down the list of records in the list. Click on the particular record that you would like to delete.
- Step 3: The Participant ID of the participant that you have selected to delete will appear in a box. If this is the correct participant number, then click your mouse on the "Delete Record" box. You will be asked if you want to delete all data for this participant. (Note: The delete function will delete all forms -- that is all Forms 1, 2, 3, 4, 5 -- for the particular participant.) Using your mouse, click on the "Yes" box to delete the participant from the data system. You will be given a last warning that you will delete a row of records. Click on the "Yes" box if you still want to delete the record. This warning will repeat for each individual form that you delete until all forms for the individual are eliminated from the system.

Although great care should be taken, it is also possible to delete a single form for a participant (without deleting all forms for a participant) by using the Datasheet View. Users should consult the Microsoft Access manual for instructions on how to do this. [Please note that such deletions should be approached with caution, because it can result in incomplete sets of forms for users in the system, e.g., you may end up with a Form 1, 3 but not a Form 2 for a participant.]

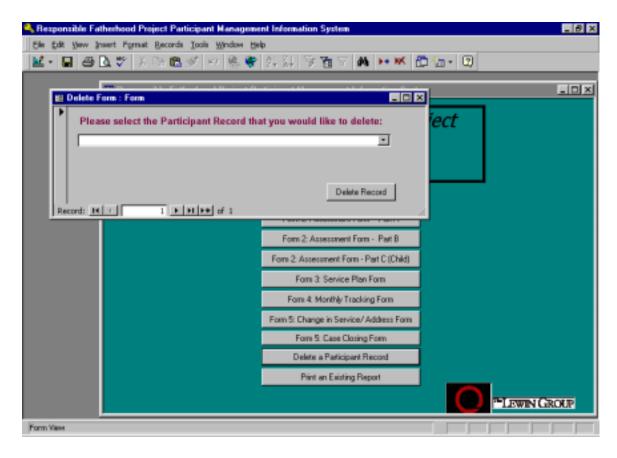


Exhibit 11: Screen for Deleting a Record

H. Making Back-Up Copies of the RFMIS

At a minimum, sites should back up the RFMIS at the end of each month. The data can be backed-up onto a floppy diskette, CD-ROM, or onto a tape backup unit. Because of its size (in excess of several mg) it will need to be compressed or zipped up to be backed-up onto a 3.5 floppy diskette. This can be done using a data compression software such as WinZip or PKZIP. The data base can be directly copied down to either a CD-ROM diskette or data tape. If you have questions on how to back up your system, please contact: John Trutko, at (703) 522-0885, or Burt Barnow, at (410) 516-5388.